Project:

Purpose: *Ex: to reduce errors, to increase efficiency between X and Y, etc.*

What are the objectives of the integration?

These are the specifics of what the integration needs to do, also known as business requirements, and defining them clearly is crucial. Lack of clarity around this step is probably the most common source of frustration resulting in project delays/setbacks, mismanaged expectations, and overspending.

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| **If [this] happens…** | **Then [this] should happen…** | **So that…** |
| *[EXAMPLE] If a Deal is created in HubSpot* | *A proposal should be generated in XYZ proposal platform* | *The Deal properties are pulled into the proposal tokens to increase accuracy and reduce duplicative data entry* |
| *[EXAMPLE] If a client makes a purchase in our homegrown ecommerce shop* | *A timeline event should be created in HubSpot with the details of the transaction* | *The marketing team can send a follow-up email in three weeks to see how they like the product* |
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Who will be involved and what role will they play?

This is the breakdown of individuals as they fit into the RACI model - that is, what role(s) in the organization are going to be Responsible, Accountable, Consulted, and Informed throughout the project.

* Responsible: also known as The Doer, this is the person(s) who actually carries out the process or task assignment and is responsible for getting the job done
* Accountable: also known as Where the Buck Stops, this is the person who is ultimately accountable for the process or task being completed appropriately; the responsible person(s) are accountable to this person
* Consulted: these are the people who are In the Loop, but are not directly involved with carrying out the task; instead, they are consulted and may be a stakeholder or a subject matter expert
* Informed: those who receive output from the process or task; may simply have an organizational need to stay informed or in the picture

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| Tasks | *ex. Project Sponsor* | *ex. Business Analyst* | *ex. Project Manager* | *ex. Technical Expert* |
| *ex. Initiate project*  |  |  |  |  |
| *ex. Establish functional requirements* |  |  |  |  |
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